

Evaluation of the Workforce Planning Process

Organization:

Manager of Workforce Planning Process:

Date:

Indicate the degree to which you agree with the following statements:

5 = Very high
very low

4 = high

3 = moderate

2 = low

1 =

1. The workforce plan is based on the organization's strategic plan.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

2. The workforce plan is designed to implement the mission, vision and goals of the strategic plan.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

3. Top management has supported the process and the results.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

4. The process involved stakeholders at all levels of the organization.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

5. The workforce planning team included participation from all levels and departments or divisions of the organization.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

6. The data analysis effectively analyzes demographic and environmental trends, and includes indicators from external (similar organizations) and internal HR sources, such as:

a. Distribution of employees by classification, age, protected group status, etc.

b. Attrition rates

c. Retirement rates

d. Ratios of managers to supervisors

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

7. The plan effectively forecasts the staffing needs for the next period (3 – 5 years), including competencies, diversity, and staffing levels.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

8. The organization has determined the number and type of employees it will need to address the organization's mission for this period.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

9. The number and types of competencies have been defined for each occupational group.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

10. Skill levels for each competency are listed.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

11. The plan includes an analysis assessing the gap between current competencies and those needed for the future.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

12. The analysis also addresses workforce size demographics occupations, and locations.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

13. Strategies address these gaps between supply and demand, with clear action plans. (This includes, where needed, leadership succession plans, compensation, performance management, workplace atmosphere and morale, recruiting and hiring, training and professional development.)

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

14. The plan has been communicated to all employees and stakeholders.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

15. Stakeholders have input into the plan before it is finalized and implemented.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

16. Support for the plan has been embedded throughout the organization by ensuring action steps and responsibilities are distributed throughout the organization.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

17. Human resources, finance, leadership, information management, and line managers and staff are prepared to provide ongoing support for workforce planning.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1

18. Continual monitoring and refinement of the plan is built into the organization's processes, to ensure ongoing effectiveness and continuous improvement, taking into account resource changes, and other conditions affecting the organization.

☐ 5 ☐ 4 ☐ 3 ☐ 2 ☐ 1